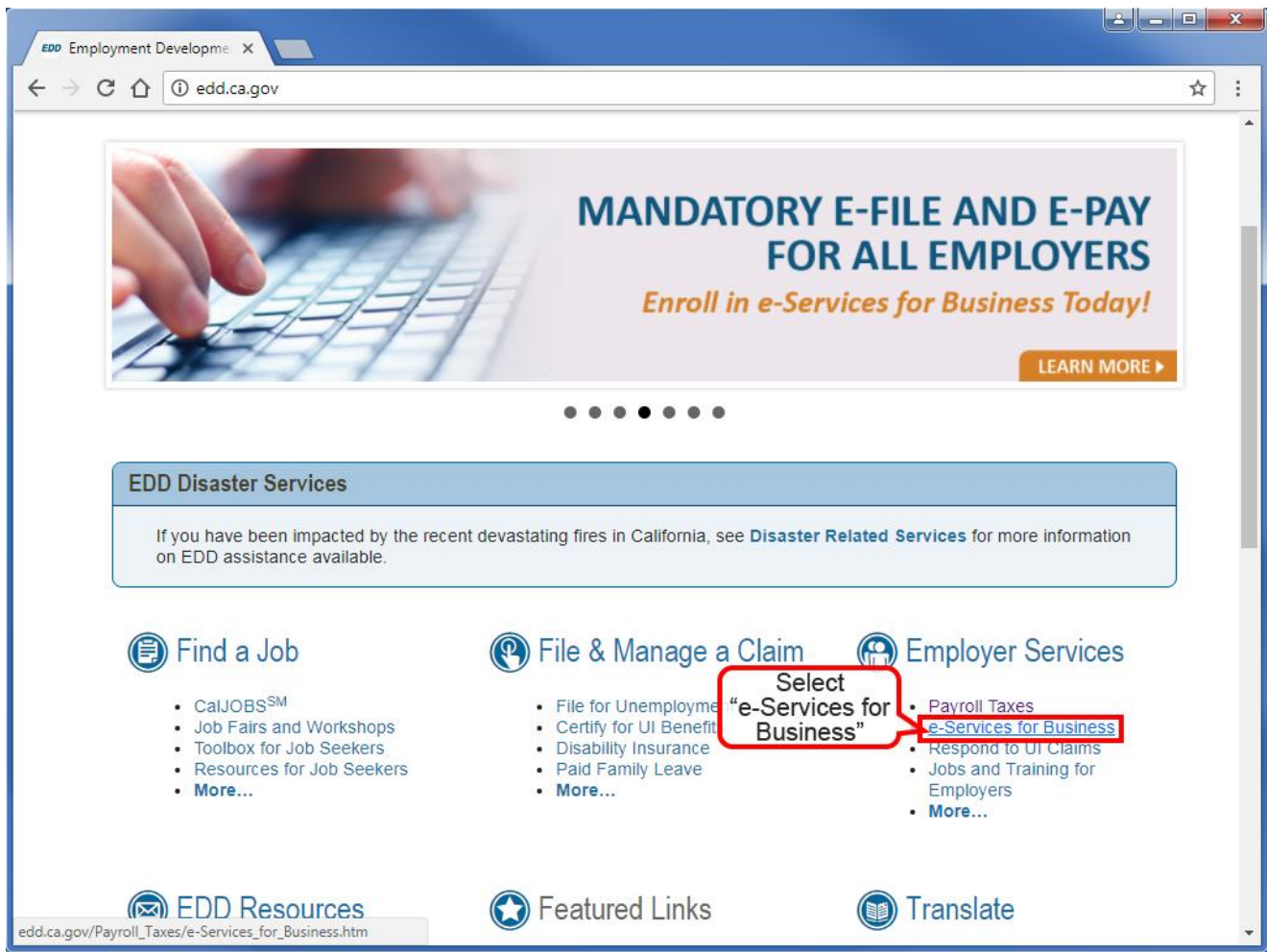


I Want to Enroll as an Agent and Add Access to Accounts in e-Services for Business

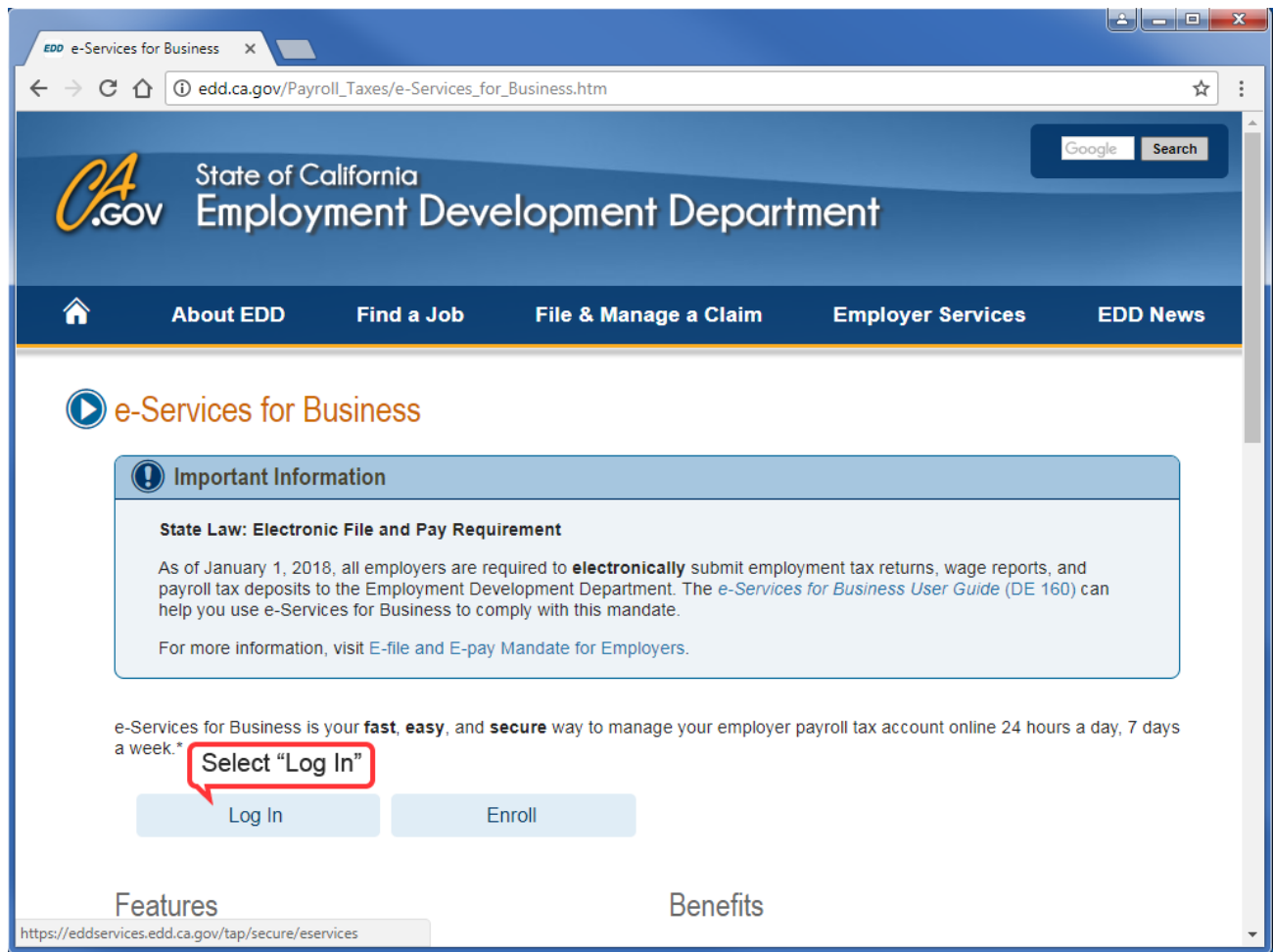
Slide notes

The California Employment Development Department (EDD) developed this tutorial to assist you with navigating through e-Services for Business. This tutorial will show you how to complete the enrollment process as an employer representative/payroll agent and how to access a client's account in e-Services for Business.



Slide notes

Welcome to the Employment Development Department home page. Notice the “e-Services for Business” link in the Employer Services column. Select the "e-Services for Business" link.



Slide notes

Select the e-Services for Business “Log In” button.

EDD Employer Services Online X

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My Profile

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Employer Services Online

Employer Services Online allows you to access e-Services for Business, eWOTC, or SIDES E-Response. If you are a new user, you must first complete a one-time enrollment process.

Login

Username: [Forgot username?](#)

Password: [Forgot password?](#)

Note: Password is case sensitive.

Select "Login"

Enroll

Enroll for a username and password to access Employer Services Online.

Slide notes

You should already have a username and password established. Enter your username and password. If you would like to learn how to enroll for a username and password refer to the tutorial "I Want to Enroll for a Username and Password to Use Employer Services Online."

Select "Login" to begin using e-Services for Business.

e-Services for Business

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e-Services Enrollment

1. Welcome to e-Services for Business

Welcome to e-Services for Business

Select Existing Employer if you are any one of the following:

- An employer who already has an employer payroll tax account number.
- An employer representative/payroll agent.
- An individual/business who is reporting Independent Contractor(s).

Select New Employer if you are:

- An employer and need to register for an employer payroll tax account number.
- Do not select this option if you are an employer representative/payroll agent.

Select "Existing Employer"

Existing Employer New Employer

Select an option

Select an option

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Slide notes

To begin this enrollment, select whether you are an Existing Employer or New Employer. An Existing Employer is an employer who already has an employer payroll tax account number or is an employer representative/payroll agent.

Select "New Employer" if you are an employer and would like to apply for an employer payroll tax account number. If you are an employer representative/payroll agent do not select this option. For this tutorial, we are going to select "Existing Employer."

e-Services for Business X

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e-Services for Business Log Out

e-Services Enrollment

1. Welcome to e-Services for Business

Welcome to e-Services for Business

Select Existing Employer if you are any one of the following:

- An employer who already has an employer payroll tax account number.
- An employer representative/payroll agent.
- An individual/business who is reporting Independent Contractor(s).

Select New Employer if you are:

- An employer and need to register for an employer payroll tax account number.
- Do not select this option if you are an employer representative/payroll agent.

I am a(n) **Existing Employer** New Employer

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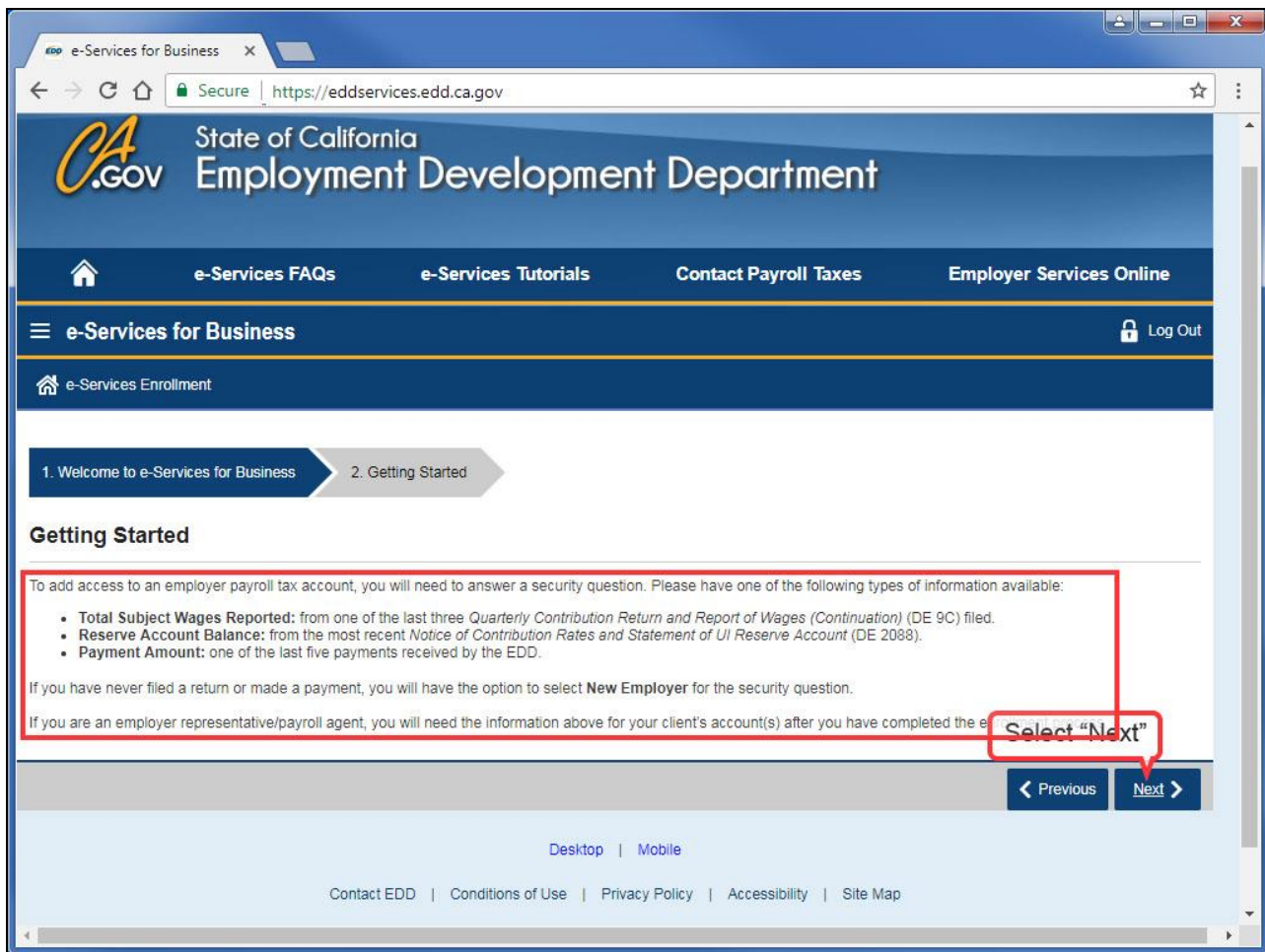
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Slide notes

Select "Next" to continue.



Slide notes

To add access to an employer payroll tax account, you will need to answer a security question. Be prepared to answer one of the questions listed here.

Select "Next" to continue.

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[e-Services Enrollment](#)

1. Welcome to e-Services for Business 2. Getting Started 3. Enrollment Type - Employer

Enrollment Type - Employer

Select "Yes" if you are

- An owner, officer, partner, executor, receiver, or trustee with an employer payroll tax account number.

I am an Employer ☒ Yes ☐ No

Please select an option
Please select an option

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Slide notes

The two types of enrollment are either an "Employer" or "Employer Representative/Payroll Agent." The first one presented is "Employer." Please take a moment and read this important message. Take time to find out what type of enrollment you want to utilize. This is a detailed explanation of the employer type.

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Home e-Services Enrollment

1. Welcome to e-Services for Business 2. Getting Started 3. Enrollment Type - Employer

Enrollment Type - Employer

Select "Yes" if you are

- An owner, officer, partner, executor, receiver, or trustee with an employer payroll tax account number.

I am an Employer ☒ Yes ☐ No **Select "No"**
Please select an option

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Select "No" for the "I am an Employer" question.

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[e-Services Enrollment](#)

1. Welcome to e-Services for Business 2. Getting Started 3. Enrollment Type - Employer

Enrollment Type - Employer

Select "Yes" if you are

- An owner, officer, partner, executor, receiver, or trustee with an employer payroll tax account number.

I am an Employer ☐ Yes ☒ No

Select "Next"

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Select "Next" to continue.

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Home e-Services Enrollment

1. Welcome to e-Services for Business 2. Getting Started 3. Enrollment Type - Employer 4. Enrollment Type - Representative/Agent

Enrollment Type - Representative/Agent

Select "Yes" if you are

- An employer representative, internal representative (e.g. employee), agent, payroll agent, third-party representative, bookkeeper, accounts payable clerk, or an accountant that represents one or more employers, and/or
- Only submitting the *Report of Independent Contractor(s)* (DE 542).

I am a Representative/Agent ☒ Yes ☐ No

Select "Yes"

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Slide notes

Please take a moment and read this important message. This is a detailed explanation of the "Representative/Agent" choice. For this example, we select "Representative/Agent."

Select "Yes" for the "I am a Representative/Agent" question.

EDD e-Services for Business X

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[e-Services Enrollment](#)

1. Welcome to e-Services for Business 2. Getting Started 3. Enrollment Type - Employer 4. Enrollment Type - Representative/Agent

Enrollment Type - Representative/Agent

Select "Yes" if you are

- An employer representative, internal representative (e.g. employee), agent, payroll agent, third-party representative, bookkeeper, accounts payable clerk, or an accountant that represents one or more employers, and/or
- Only submitting the *Report of Independent Contractor(s)* (DE 542).

I am a Representative/Agent ☒ Yes ☐ No

[Select "Next"](#)

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Select "Next" to continue.

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e-Services for Business Log Out

e-Services Enrollment

Welcome to e-Services for Business 2. Getting Started 3. Enrollment Type - Employer 4. Enrollment Type - Representative/Agent 5. Enrollment

Enrollment

Enter your own information, not your client's.

An internal representative (e.g., employee) or accounts payable clerk should enter their employer's information.

Select type of ID you would like to enroll with Required

Select Country Required

ZIP Code Required

Select "Social Security Number"

Required FEIN Social Security Number USA

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Slide notes

Select the type of ID you would like to enroll with. You have a choice of Social Security number (SSN) or Federal employer identification number (FEIN). If you are currently a business with a FEIN, you may select it.

If you are an individual, you may select Social Security number. For this example, we select "Social Security number."

The screenshot shows a web browser window with the URL <https://eddservices.edd.ca.gov>. The page has a dark blue header with navigation links: [e-Services FAQs](#), [e-Services Tutorials](#), [Contact Payroll Taxes](#), and [Employer Services Online](#). Below the header is a section titled "e-Services for Business" with a "Log Out" link. A sub-header "e-Services Enrollment" is also present. A progress bar indicates the current step: "1. Welcome to e-Services for Business" (completed), "2. Getting Started" (completed), "3. Enrollment Type - Employer" (current step), "4. Enrollment Type - Representative/Agent", and "5. Enrollment". The main content area is titled "Enrollment" and contains instructions: "Enter your own information, not your client's." and "An internal representative (e.g., employee) or accounts payable clerk should enter their employer's information." The form fields include: "Select type of ID you would like to enroll with" (dropdown menu with "Social Security Number" selected), "ID Number" (text field with "XXX-XX-XXXX"), "Select Country" (dropdown menu with "USA" selected), and "ZIP Code" (text field with "95814"). A red box highlights the "Next" button with the text "Select 'Next'". The footer contains links for "Desktop" and "Mobile", a list of links: [Contact EDD](#), [Conditions of Use](#), [Privacy Policy](#), [Accessibility](#), and [Site Map](#), and a copyright notice: "Copyright © 2018 State of California".

Slide notes

Enter the ZIP Code related to the FEIN or SSN that you entered. When all fields are completed, select "Next" to continue.

The screenshot shows a web browser window with the URL <https://eddservices.edd.ca.gov>. The page is titled "e-Services Enrollment" and features a progress bar with six steps: 1. Getting Started, 2. Getting Started, 3. Enrollment Type - Employer, 4. Enrollment Type - Representative/Agent, 5. Enrollment, and 6. Agent Information. The current step is "Agent Information".

Below the progress bar, the heading "Agent Information" is followed by the instruction "Enter your own information, not your client's." The form contains the following fields:

- Organization Type: Individual / Sole Proprietor (dropdown menu)
- First Name: AGENT
- Last Name: REPRESENTATIVE
- Location Address: 123 ANY ST
- City: SACRAMENTO
- State: CALIFORNIA (dropdown menu)
- ZIP Code: 95814
- Select Country: USA (dropdown menu)

At the bottom right of the form, there are two buttons: "Previous" and "Next". A red box highlights the "Next" button with the text "Select 'Next'" inside it. Below the buttons, there are links for "Desktop" and "Mobile". At the very bottom, there are links for "Contact EDD", "Conditions of Use", "Privacy Policy", "Accessibility", and "Site Map". The footer text reads "Copyright © 2018 State of California".

Slide notes

Complete this page with your own information, not your clients.

When the information is completed, select "Next" to continue.

e-Service for Business X

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e-Service Enrollment

3. Enrollment Type - Employer 4. Enrollment Type - Representative/Agent 5. Enrollment 6. Agent Information 7. Review Enrollment Request

Review Enrollment Request

Type of Enrollment

Organization Type

First Name

Last Name

Location Address

City

State

ZIP Code

Select Country

Select "Submit"

[< Previous](#) [Submit](#)

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Slide notes

Now you are ready to submit this request. Select "Submit."

The screenshot shows a web browser window with the URL <https://eddservices.edd.ca.gov>. The page is titled "e-Services Enrollment" and features a progress bar with steps: 3. Enrollment Type - Employer, 4. Enrollment Type - Representative/Agent, 5. Enrollment, 6. Agent Information, and 7. Review Enrollment Request. The current step is "Review Enrollment Request".

The form contains the following fields:

- Type of Enrollment: Employer Representative/Agent
- Organization Type: Individual / Sole Proprietor
- First Name: AGENT
- Last Name: REPRESENTATIVE
- Location Address: 123 ANY STREET
- City: SACRAMENTO
- State: CALIFORNIA
- ZIP Code: 95814
- Select Country: USA

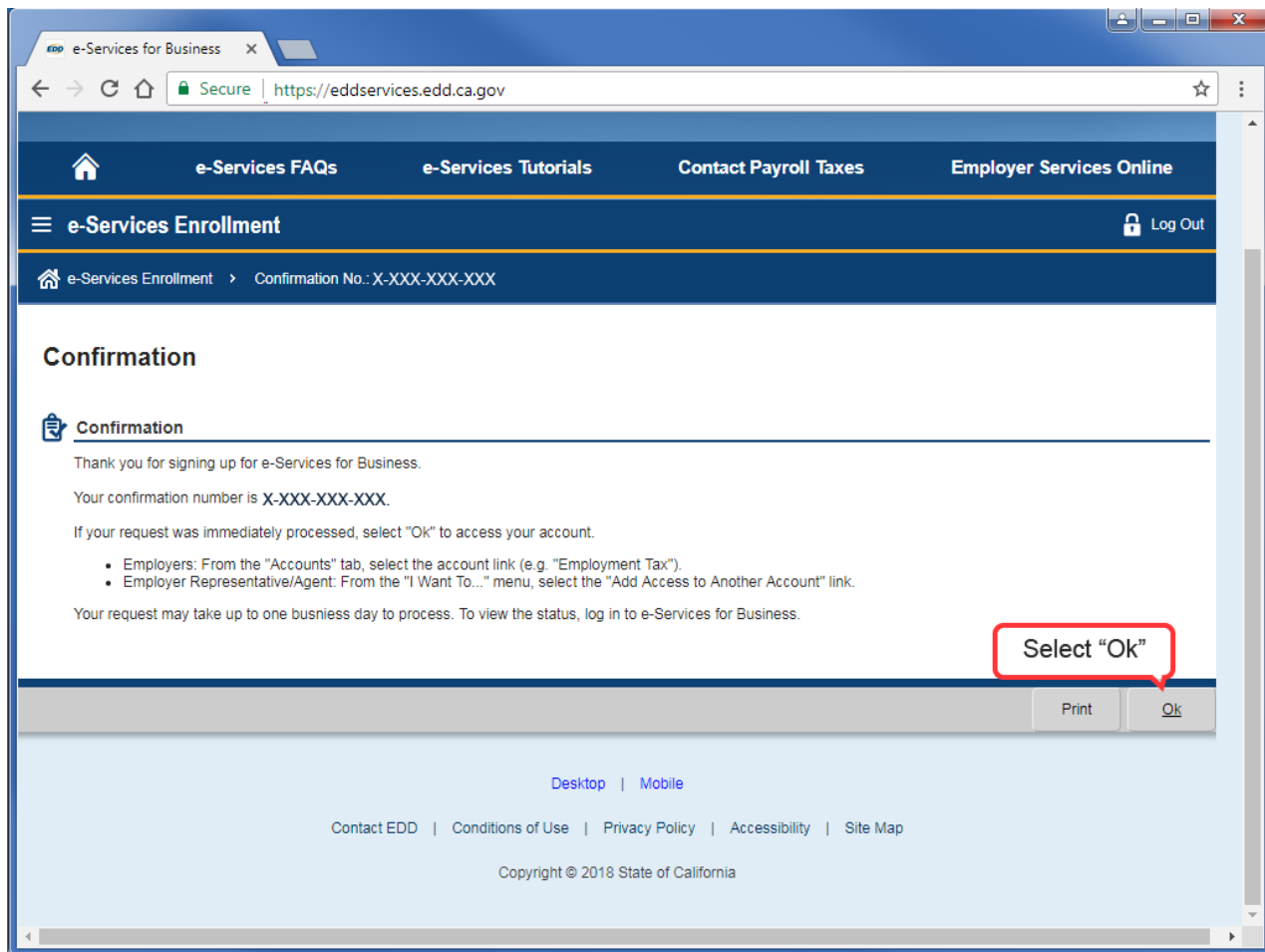
A confirmation dialog box is displayed in the center of the screen with the text: "Are you sure you want to submit this request?". It has two buttons: "Ok" and "Cancel". A red box highlights the "Ok" button with the text "Select 'Ok'" written next to it.

At the bottom of the form, there are two buttons: "Previous" and "Submit".

The footer of the page includes links for "Desktop" and "Mobile", and a list of links: "Contact EDD", "Conditions of Use", "Privacy Policy", "Accessibility", and "Site Map". The copyright notice at the bottom reads "Copyright © 2018 State of California".

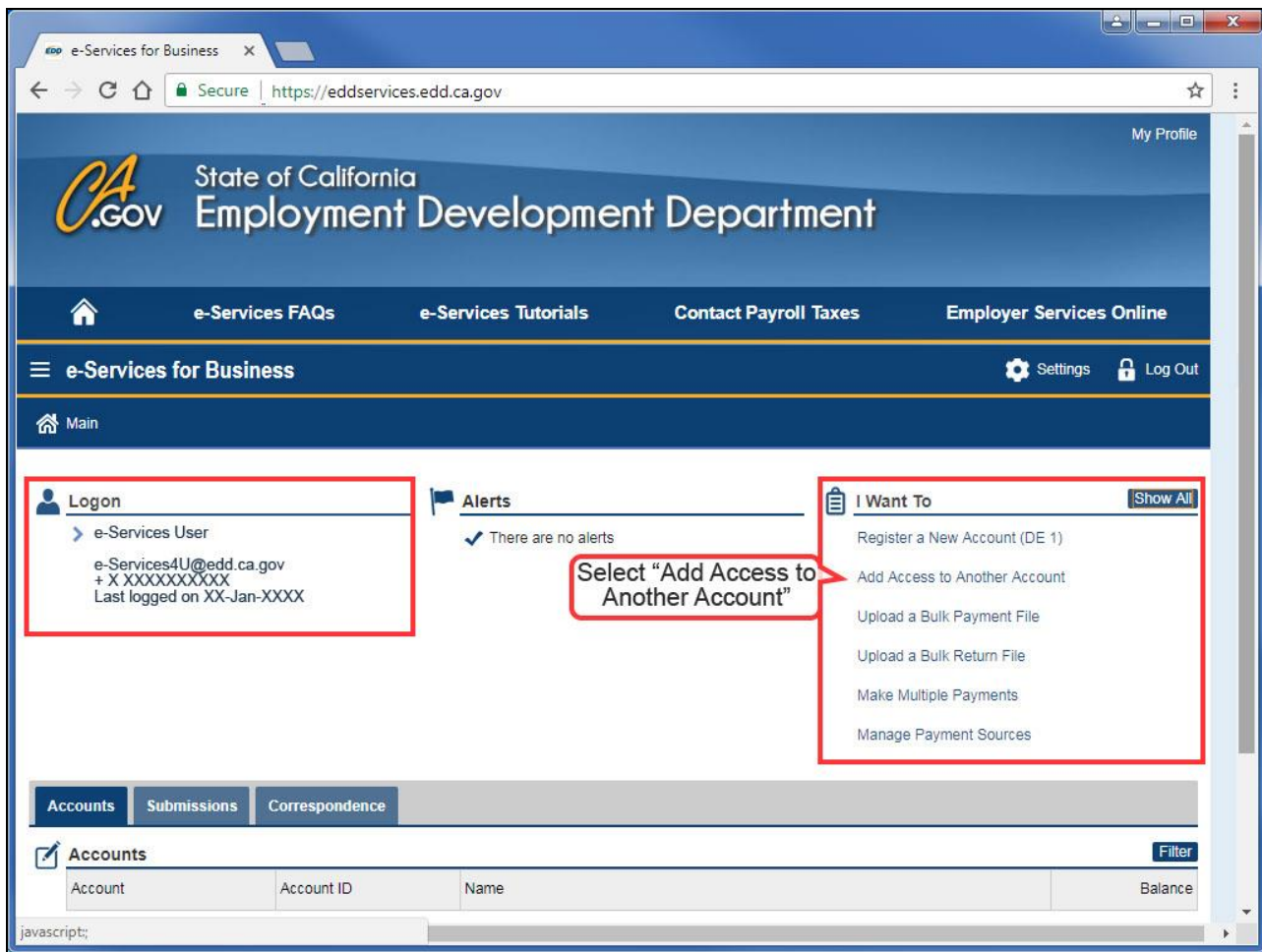
Slide notes

Are you sure you want to submit this request? Select "Ok" to continue.



Slide notes

Here is the confirmation page telling you that your enrollment request is being processed. Select "Ok" to return to the e-Services for Business home page.



Slide notes

The e-Services for Business home page shows a summary of your enrollment information as the agent. From the "I Want To" menu, select "Add Access to Another Account" to gain access to your client's account. Repeat these steps for each client account number.

e-Services for Business

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Main Settings Log Out

Main > Add Access to Another Account

Add Access to Another Account

To add access to an employer payroll tax account, you will need to answer one of the following security questions.

- **Total Subject Wages Reported:** from one of the last three *Quarterly Contribution Return and Report of Wages (Continuation)* (DE 9C) filed.
- **Reserve Account Balance:** from the most recent *Notice of Contribution Rates and Statement of UI Reserve Account* (DE 2088).
- **Payment Amount:** one of the last five payments received by the EDD.

1. Account Validation

Account Validation

Select "Employment Tax"

Required Required

- 1. Employment Tax
- 2. DIEC (DI Elective Coverage)
- 3. School Employees Fund
- 4. DIR Collection

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Slide notes

Select "Account Type." For this example, we select "Employment Tax."

e-Services for Business x

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Add Access to Another Account

To add access to an employer payroll tax account, you will need to answer one of the following security questions.

- **Total Subject Wages Reported:** from one of the last three *Quarterly Contribution Return and Report of Wages (Continuation)* (DE 9C) filed.
- **Reserve Account Balance:** from the most recent *Notice of Contribution Rates and Statement of UI Reserve Account* (DE 2088).
- **Payment Amount:** one of the last five payments received by the EDD.

1. Account Validation

Account Validation

Account Type: 1. Employment Tax ▼

Account Number: XXX-XXXX-X

Country: USA ▼

ZIP Code: 95814

Security Question

Choose a security question to answer: 2. Reserve Account Balance ▼

Enter reserve account balance from the most recent DE 2088: 0.00

Select "Next"

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Slide notes

Enter the "Account Number", "Country", and "ZIP Code" then select a security question to answer. For this example, we select "Reserve Account Balance." Select "Next" to continue.

e-Services for Business

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1. Account Validation 2. Summary

Summary

Account Type: 1. Employment Tax

Account Number: XXX-XXXX-X

Country: USA

ZIP Code: 95814

Security Question

Choose a security question to answer: 2. Reserve Account Balance

Enter reserve account balance from the most recent DE 2088: 0.00

The account number you are trying to gain access to is xxx-xxxx-x. Select Submit to add access to this account.

Select "Submit"

< Previous Submit

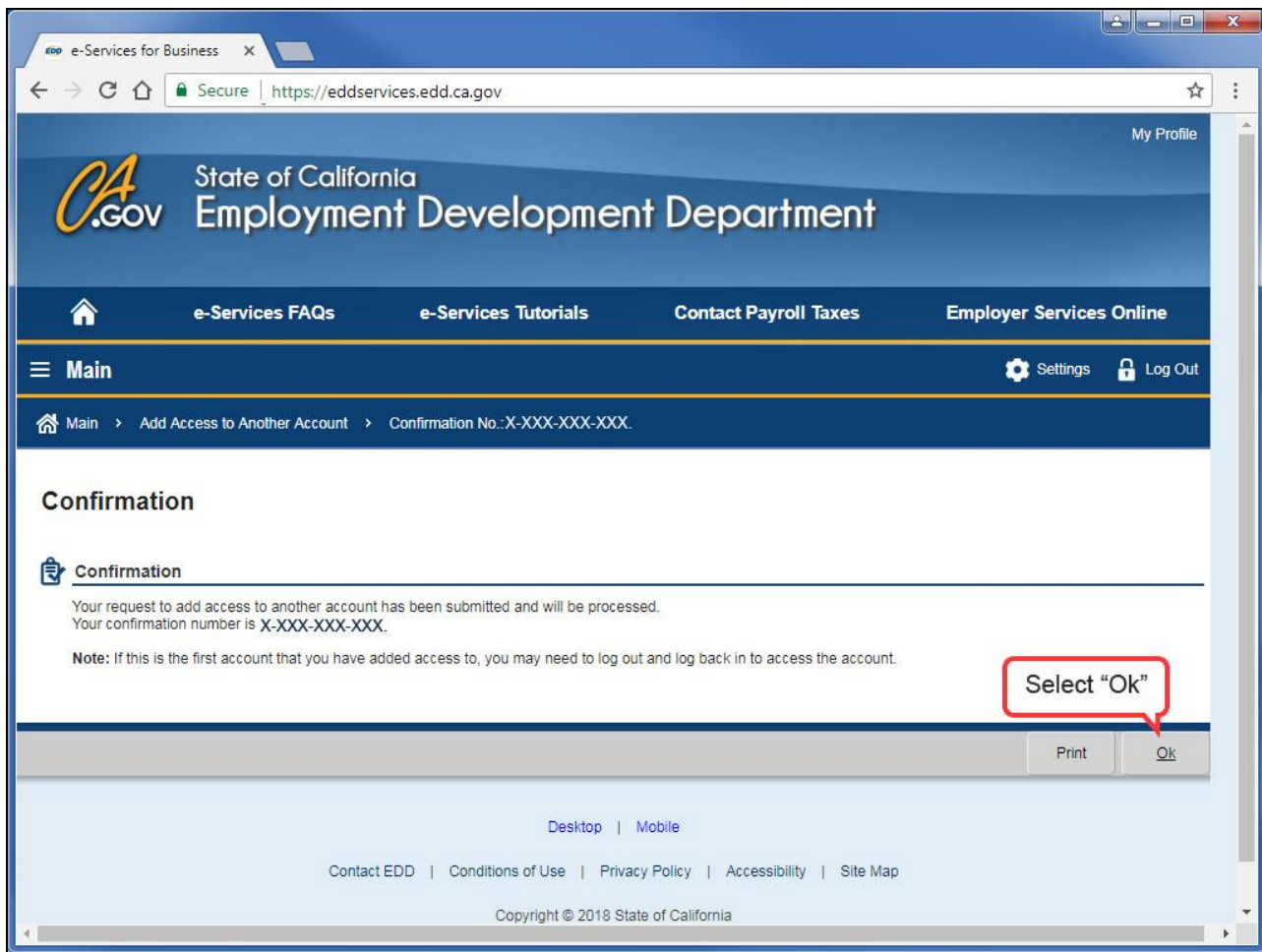
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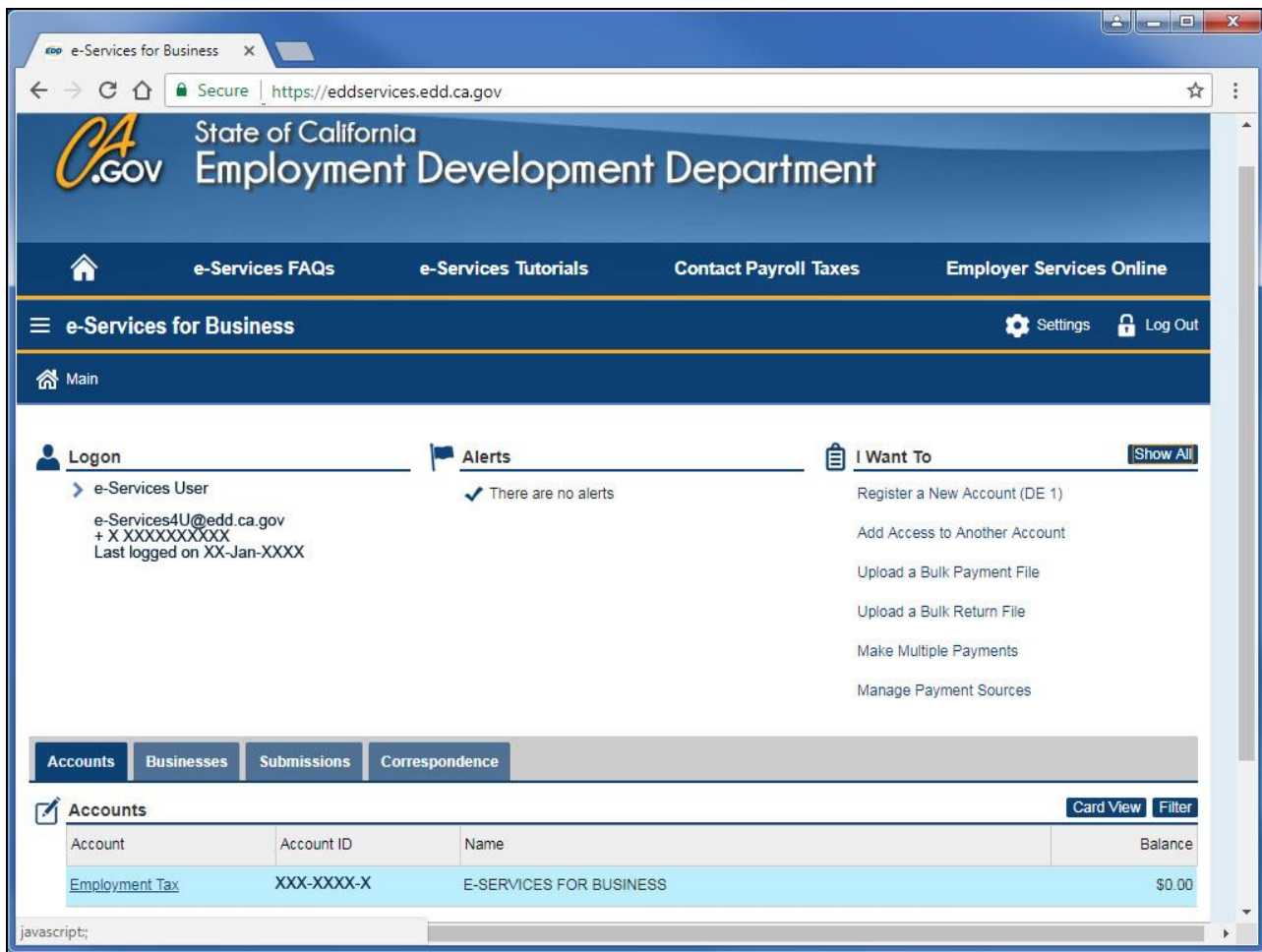
Slide notes

The message at the bottom informs you that you are trying to add access to the specified account. Select "Submit" to add access to this account.



Slide notes

Here is your confirmation number for the request to add access to another account. You can print a copy for your records and then select "Ok" to continue.



Slide notes

You can now see the newly added account located under the “Accounts” subtab on the home page.

There are many other actions on the home page that an employer representative or payroll agent may find helpful for managing multiple accounts. Most of these actions can be accessed by selecting “Show All” next to the “I Want To” menu.

Other Resources
www.edd.ca.gov

Taxpayer Assistance Center
1-888-745-3886

Slide notes

Thank you for taking the time to watch this tutorial on how to enroll and navigate through e-Services for Business as an employer representative or payroll agent.

Be sure to view our other tutorials demonstrating how to file bulk returns, make bulk payments, and the many other actions available in e-Services for Business.

Other resources are available at www.edd.ca.gov or by calling the Taxpayer Assistance Center at 1-888-745-3886.